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## With Careful Consideration and Managed Expectations: Migration from Ex Libris' Voyager to Ex Libris' Alma/Primo

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# ILS MIGRATION STORIES

PRESENTED BY LLAMA TECHNOLOGY COMMUNITY OF PRACTICE

JUNE 25, 2017

# PANELISTS

- Elizabeth Novicki, Director of Libraries, Salem Academy
- Leland Deeds, Head of Systems, University of Miami
- Julene Jones, Head of Database Integrity, University of Kentucky
- John Sterbenz, University of Michigan, Ross School of Business



WITH CAREFUL CONSIDERATION AND MANAGED  
EXPECTATIONS:

MIGRATION FROM EX LIBRIS' VOYAGER TO EX LIBRIS'  
ALMA/PRIMO

JULENE JONES  
UNIVERSITY OF KENTUCKY LIBRARIES

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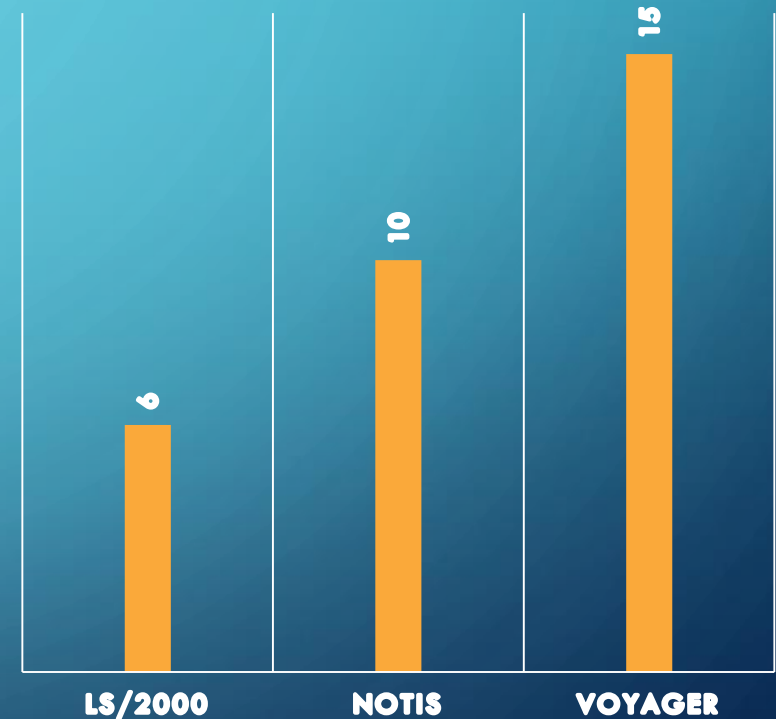
# ABOUT UNIVERSITY OF KENTUCKY & ITS LIBRARIES



- 1 main library + 10 branch libraries, including Medical Center, Law, and Special Collections + 2 storage facilities
- Collection of ~ 4 million print volumes, ~ 2 million e-books, ~200,000 circulations per year
- Student population ~ 31,000, faculty and staff ~6,000
- 60 library faculty and 90 library staff
- Regional Federal Depository Library
- Land grant institution, founded 1865

# UNIVERSITY OF KENTUCKY MIGRATION

- 2011: OCLC Reclamation
- 2012: Internal WG: “next gen” ILS
- Live on Alma and Primo January 2016
- Migrated in 6 months; down ~ 1 month
- Migration task forces for Alma (me), Primo, Interoperability, migration oversight
- 4 librarians are Alma Certified



Data UK migrated

Bibliographic,  
holding, and item

Patron

Acquisitions (3 yrs)

Authorities (local  
file imported)

System data  
(calendars, circ.  
policies)

Circulation history

Reserves

License information

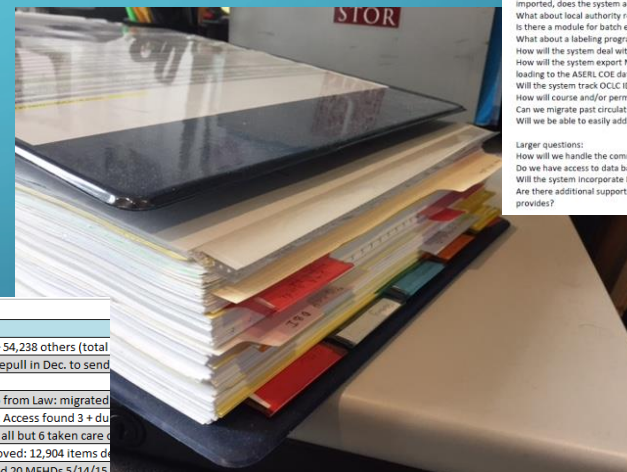
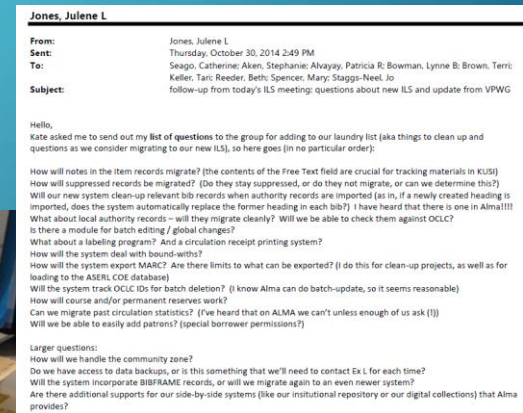
Did not migrate / config. required



# PRE-MIGRATION: NAKED DATA VOYAGER → ALMA

Focus on data clean-up projects that impact migrated data!

- Item record's spine label field does not migrate: ~ 1 million item records
- Item location mismatch to holdings location
- Deleted closed out POs (older than 3 years)
- Review of location codes: 575 to 286
- Duplicate patron records



Alma Premigration Database Maintenance Tracker - University of Kentucky Libraries, Julene Jones				
Project	Source	Page	Priority	Progress
spine label item field won't migrate --> Freetext	V-A guide	25	1, done	42,874 moss (or prev.) items + 54,238 others (total)
CSV file determining portfolio/pkg/db	Ex Libris team		test done; re-do Dec.	saving to N: now for review; repull in Dec. to send
Obsolete indicators	suggested by CDI		(possible)	
we plan to migrate owning library to 901s; anything there?			1, done	scanned 8/10/15; found 4,235 from Law; migrated
Any bibs without 245?	App. B	24	1, done	GDC scan didn't work 8/10/15; Access found 3 + du
Any bibs with multiple 245s?	somewhere in documentation...		1, done	304 total; rescanned 7/28/15; all but 6 taken care of
No items attached to e-resources	V-A guide	(SuDoc p.24)	1, done	all *net* locations items removed; 12,904 items d
Do we have any mfhd's with 852  c	V-A guide	11	1, done	GDC scan run 5/13/15, resolved 20 MFHDs 5/14/15
"e items"	migration form		1, done	report sent to Terri Brown 7/22/15
mark SFX bibs 035 (SFX)	migration form		1, done; redo Dec.	none had 035 (SFX) per scan 8/4/15; added to 12,65
Bibs without mfhd's	good practice		December	(This is in Julene's regular workflow)
Export all locally created authorities for import into Alma	Data Deliv	6	December	do this right before final load
Lost-System Applied list - pull for review just before cut-o	Laura's list		December	(Julene's regular workflow)
All physical resources have an item attached	V-A guide	19	no	We did not do anything about this, though we hav



# CAREFUL CONSIDERATION & MANAGED EXPECTATIONS

- Decide what is most valuable to your institution: data, staff comfort, other
- Any thing you're worried about: Test it or Ask about it!
- Change and stress is perpetual → take care of yourself; do not document everything!
- Communicate what you like about new system; celebrate any forward progress
- Go live  $\neq$  100% comprehension of new system

# UNIVERSITY OF KENTUCKY LIBRARIES: TODAY

- Was the migration a success?      Yes and No
- In hindsight...
  - Active/inactive barcodes
  - Call number / call number type mis-matches
  - SFX records with attached POs
  - Reduction of location codes: too severe
- Submitted enhancement requests & Idea Exchange suggestions
- Pace of change: culture shift

QUESTIONS

